LEAD 2013–2014

LEAD Process Refresher

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This presentation will cover:

- Submission dates and pacing target timeline
- Updates and Changes for 2013–2014
- Common pitfalls
- Review of manual materials
- Review of upload steps and report comments

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Submission Dates

FALL	
September 3	EPSB LEAD reporting system activated
November 1	Deadline to digitally sign-off on your report to fully submit it
Spring	
January 15	EPSB LEAD reporting system activated
February 28	Deadline to digitally sign-off on your report to fully submit it
March 1 – 31	HQ report tool will be available
	NOTE: Principals will NOT be able to access the HQ Reporting Tool via EPSB website until the district LEAD coordinator has signed off on the LEAD report

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Pacing Target Dates – Fall

September 20	Have first upload of export file completed by now Run the 1st Preliminary Audit Report
September 30	All "Staff Warnings" (incorrect SSN, no courses) should be resolved Give staff listing pages of full report to schools for verification
Ongoing	Have schools make assignment corrections at the school level Continue to export and upload to EPSB as necessary Always re-run the Preliminary Audit Report to see the newest updates
October 4	MUNIS Data should begin to appear ***Do not sign off until MUNIS data is in your report***

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Pacing Target Dates – Fall cont.

October 7	Have most edits completed
October 10	Consult with your district KTIP coordinator if you have outstanding SOE errors (KTIP deadline 10/15) Give full reports to school level administration for verification
October 21	*Recommended* deadline for switching from editing at local level to editing online only
November 1	**Deadline to digitally sign-off on your report to fully submit it**
November - January	Update and verify roles in KECI EPSB will auto-update the role of teacher Continue to pre-populate HQ status boxes in the SIS. Use the online HQ calculator as necessary Have principals carefully review Full Data reports prior to Spring LEAD

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Pacing Target Dates – Spring

January 28	Have first upload of export file completed by now Run the 1st Preliminary Audit Report
February 4	All "Staff Warnings" (incorrect SSN, no courses) should be resolved Give staff listing pages of full report to schools for verification
Ongoing	Have schools make assignment corrections at the school level Continue to export and upload to EPSB as necessary Always re-run the Preliminary Audit Report to see the newest updates
February 11	Have most edits completed

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Pacing Target Dates – Spring cont.

February 11	Consult with your district KTIP coordinator if you have outstanding SOE errors (KTIP deadline 2/15)
February 15	Give full reports to school level administration for verification
February 21	Recommended deadline for switching from editing at the local level to editing online only
February 28	**Deadline to digitally sign-off on your report to fully submit it**
March 1 – 31	HQ report tool will be available
	NOTE: Principals will NOT be able to access the HQ Reporting Tool via EPSB website until the district LEAD coordinator has signed off on the LEAD report

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Updates and Changes
2013–2014

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Teaching Method

- Teaching methods have a variety of purposes
  - LEAD clearing rules
  - KDE tracking of specific course types
  - School Report Card and other data uses
- Same course – different teaching method
  - each teaching method requires a separate course number
- Data Quality
  - Accuracy is important!
- Use ad hoc report to find courses linked to old teaching methods
  - Curriculum LEAD Invalid Teaching Method

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Teaching Method

- Dropdown changed in January
- New List:
  - 01–Direct Instruction (default)
  - 02–3rd Party Contract
  - 10–Digital Learning Provider (replaces Plato, KVHS etc.)
  - 11–Dual Credit – District Offered
  - 12–Dual Credit – College Offered
  - 13–Credit Recovery – direct instruction
  - 14–Credit Recovery – digital learning provider
  - 15–Transitional Course – KDE curriculum
  - 16–NAF Academy Course
  - 17–NAF Academy Dual Credit – District offered
  - 18–NAF Academy Dual Credit – College offered
  - 19–District Provided self study

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LEAD and TSDL/TOR

- Scheduling accuracy is more important than ever to ensure correct, strong Teacher-Student Data Links (TSDL)
- From the Teacher of Record Data Standard:
  - A Teacher of Record in a Kentucky public school is a certified teacher who has been assigned the lead responsibility for the student's learning in a subject/course aligned to Kentucky Core Academic Standards or Career and Technical Skill Standards Documents.
- Same concept as used for LEAD – who is doing the teaching?

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Teacher of Record and the Staff History Tab

- **Primary Teacher –** Certified teacher who has been assigned the lead responsibility for the student's learning in a subject/course
  - Every course MUST have a **Primary** Teacher
- **Teacher/Section Staff** – An individual who has been assigned the responsibility to provide additional services that support and increase a student's learning.
  - **Note:**
    - Individuals added as Teacher have access to the Primary Teacher's grade book and attendance roster.
    - Individuals added as Section Staff **do not have** access.
    - Only 1 additional teacher will pull into the CIITS system. "Teacher" records pull first

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Elementary Scheduling

- New data standards for elementary scheduling require students be assigned to sections where the primary teacher is the individual actually providing content instruction
  - A single self contained classroom can no longer be used
- Courses for each content must be created and scheduled within the instructional minutes of the day
- A multiple period, period schedule, can be setup to allow sorting by homeroom.

Elementary Scheduling

- Homeroom or self-contained courses can be scheduled across all instructional periods
  - At least one period should only have a homeroom/self-contained course scheduled to allow sorting
  - The homeroom state code will vary based on self-contained (701010 or 702010) vs. departmentalized (703001)
  - As long as the one class where attendance is taken spans all periods, attendance will only be taken once a day
  - All instructional courses will be placed in the instructional period. The attendance check box should be left blank.
- All specialty classes (art, music) should also be included in the instructional period (even if no grades are given). The attendance check box should be left blank.

Rotation Classes

- In order to track which teacher is teaching which student in content areas, districts can no longer schedule students into rotating classes where multiple teachers teach different content areas.
- A separate course number linked to the appropriate state course code is required for each content within a rotation
  - No longer use the 909999 state course code
- If a composite grade is required for the rotation courses, please see the Scheduling Rotating Courses Manual developed by KDE for instructions on setting up composite grading using grading tasks. (link is provided in the Teacher of Record data standard)
  - http://education.ky.gov/teachers/HiEffTeach/Documents/Manual%20for%20Composite%20Grading%20for%20Rotating%20Classes%20in%20Infinite%20Campus.pdf

State Course Codes

- Uses
  - Determine content for a course and who can teach it
  - Identify courses where an End of Course exam is required
  - Data research
  - School Report Card information
  - AP information
  - KEES and TEDS linkages
- Linking required by 704 KAR 3:540
- Look at the description, not just the title!
- Use reports to check code linking
  - State Published ad hoc: "curriculum State Course Codes"
  - KDE Reports: Missing of Invalid Course StateCodes

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State Course Codes: Reports

- Ad hoc report – shows district course number and course name and state course code and state course code name
- Have schools review periodically to make sure courses match correctly.

State Course Codes Total Records:511

All Records

Course Number	Name	State Course Code	Description
71011504	AG CONSTR	010241	Ag. Construction Skills
71011505	AG CONSTR	010241	Ag. Construction Skills
71211504	LAND-TURF MNGT	010631	Landscape & Turf Mgmt
71251504	GREENHOUSE II	010641	Greenhouse Tech.
71241504	GREENHOUSE TECH	010641	Greenhouse Tech.
11010204	SR TR HORTICULTURE	010652	ST: Hortic. & Plant Sci Sys

- Example of mismatch:

0001021	LIFE SKILLS	000102	Fund Life Skills
26021145	HON ENG I	904010	Study Skills
26091245	HON ENG II	904010	Study Skills

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State Course Codes: Reports

- KDE Report: Missing or Invalid Course StateCodes
  - Identifies courses with no state code or with codes that are not valid for the current school year
    - KDE Uniform Academic Course Codes website has a "change" document to help identify courses that have been removed from the current list

7/17/2013 12:00:00 AM

Courses with Missing or Invalid State Codes

School Name	District Course Code	Invalid or Missing State Course Code	District Course Name
Lynn Camp Schools			
	70416	230104	7TH HON LANG ARTS

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Common Pitfalls

Common pitfalls and errors

- Extract Errors
- Staff missing from LEAD report completely
- "No Courses for Staffmember" error
- Certified positions
- Upload errors
- Certification Issues

Common pitfalls and errors

- Extract Errors
  - PROBLEM: Spending too much time on the errors at the start of the reporting period
    - While these are errors that need to be resolved, they should not delay your initial upload by more than 1 week.
    - Move foreword with uploading while continuing to work through the issues
  - PROBLEM: Not fixing the extract errors at all
    - Errors on the Extract Summary represent data pieces that will NOT make it into the LEAD report.
      - Serious data quality issue for the report
    - The extract report *MUST* be clean prior to your final extract.

Extract Errors
See the SIS section of the LEAD manual for details

▸ **Error 1: Missing Social Security # / Employee Type Error**
  ◦ **Error text:** "**Error**: The following records do not have SSN, EMP TYPE or Both and will NOT be included in the final report"
▸ **Error 2: Duplicate Social Security # Error**
  ◦ **Error text:** "**Warning**: The following staffs have duplicate SSNs. (Number of Records:##)"
▸ **Error 3: Emp Type 01 Not Assigned a Course/Section**
  ◦ **Error text:** "**Warning**: The following EMP TYPE 01 staff are NOT assigned to a course section"
▸ **Error 4: Core ID / Alt CNUM both blank**
  ◦ **Error text:** "**Warning**: The Core ID and ALTCNUM are both blank"
▸ **Error 5: Primary Teacher not active on last day of section**
  ◦ **Error text:** "**Warning:** The most recent Primary Teacher for the listed sections has a staff history record end dated prior to the last day of the section. These sections will still report on LEAD. Most recent Primary Teacher is listed below with each applicable course."
▸ **Error 6: Section has no primary teacher**
  ◦ **Error text:** "**Warning:** The sections listed below have never had a Primary Teacher assigned. These sections will not report on LEAD.

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Common pitfalls and errors

▸ Missing Staff
  ◦ PROBLEM: Staffmembers, especially teaching staff, missing from the report entirely
    • Data Quality issue – need to catch EARLY
      • Even more important with TOR/PGES
  ◦ How to find error: have schools do a staff list review within the first 2-3 uploads.
    • Carefully check both EPSB and SIS Name lists for any missing staff (compare names to make sure no error exists)
  ◦ How to fix: ensure the staffmember has
    • A valid SSN in IC
    • A valid teacher/staff number in IC
    • A valid district employment and district assignment

Often, this requires a support ticket to IC to find/fix. FILE EARLY and follow up frequently. This is an error that must be resolved.

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Staff list review
See sample report in manual, page 9

▸ Compare EPSB Name to SIS Name
  ◦ Examples A and B
▸ Look for teachers without SIS data
  ◦ Examples C and D

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Common pitfalls and errors

- No Courses for Staffmember Error
  - PROBLEM: The causes of this error are not always identifiable so it gets ignored.
  - How to find error: Carefully check the staff warnings on the school list after each upload

Staff					
SSN	Teacher #	EPSB Name	EMPTYPE	A/A NAME	COMMENT
100201DAB	100201DAB		TEACHER	MCCOIE, PAT	No courses for Staffmember
100301DCD	100301DCD		TEACHER	SMITH, SANDY	No courses for Staffmember
100401DEF	100401DEF		TEACHER	ADAMS, DEB	No courses for Staffmember
100501DGH	100501DGH		TEACHER	GODSEY, ROB	SSN not found in EPSB database

  - NOTE: This is an acceptable error if the individual's assignment at that location ended after the start date on the extract
  - How to fix:
    - Ensure the staffmember has a valid SSN in IC and that the SSN on the demographics and identities tab match
    - Check District Assignment, and District Employment tabs for valid entries.

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Common pitfalls and errors

- How to Fix (cont.):
  - Check the schedule to make sure the individual has been assigned to one or more courses
    - If so, make sure the course is active and in a period within the instructional minutes
    - If the individual is a collaborating special ed teacher, they must be assigned as an additional teacher on one or more instructional courses
    - If the individual is a teacher but does not have their own group of students (i.e. Gifted or Reading Recovery) you have 2 options
      - Assign them a course in the schedule; a population will be needed in the population dropdown
      - Assign them as a collaborating teacher in the courses from which they pull students
  - **Do not** change the employee type to Support or Other to make this error disappear.

Often, this requires a support ticket to IC to find/fix. FILE EARLY and follow up frequently. This is an error that must be resolved.

Common pitfalls and errors

- Certified Positions
  - PROBLEM: Classified persons serving in certified positions
  - Courses such as PLATO, KET, In-School Suspension/Detention (ISS/ISD/SAFE) **require a certified teacher serving <u>in the classroom</u> as the facilitator.**
  - Do not assign the certified individual as teacher of record just to clear LEAD

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Common pitfalls and errors

▸ Upload errors
  ◦ PROBLEM: Data issues causing upload errors/Big Red Stop Sign
  ◦ How to find:
    · Stop sign error on upload OR
    · Error message:
      · The entry CNUM='0000_202', SCHCODE = '165', SSN = 'xxx-xx-xxxx', ACAD_YR_ENDING='2011', ACD_SCH_TERM='1' AND DISTNO='abc' has a teacher of record who is not listed in the staff data.
  ◦ How to fix (or prevent):
    · Run ad hoc reports to find initial errors prior to first upload
    · Ensure the staffmember has a valid district employment and district assignment
    · Check the staff list for duplicated entries
    · **Train staff to use the "Staff Locator" when entering a new staffmember – searches by SSN**
    · Train staff to use the identities tab when changing name etc for current staff members
    · Check the identities tab for a missing/different SSN
    · Use only numerical values for the teacher number
  ◦ If you get the Big Red Stop Sign, e-mail EPSBLEADTEAM@ky.gov with your name, the district name, and the time of your error

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Common pitfalls and errors

▸ Certification issues (biggest problem!)
  ◦ PROBLEM: Not using KECI and LEAD report to full advantage for permissions and certificate status
  ◦ How to fix: **Use** (and share with your HR director) the Preliminary Audit Report from LEAD **by** October 1-15 to make sure you don't have:
    · Interns not in KTIP
    · Expired certificates
    · Teachers out of field
    · New principals without COE submitted, etc.

Common pitfalls and errors

▸ Certification issues (cont.)
  ◦ No person without a valid certificate should still appear as a LEAD error by this time frame
  ◦ All persons holding only an SOE must be entered into KTIP – this is not "Optional"
    · *If KTIP is out of "slots" the district must file a paper SOE as soon as the individual is hired*
  ◦ Permissions can be found by searching for the teacher/intern in KECI—train principals!
    · KDE content permissions are in KECI, not course names

The LEAD Manual

The LEAD Manual

▸ Resources section
  ◦ Content list
    · Bold NCLB indicators are HQ required areas
  ◦ MUNIS reference chart
    · If an individual has no certification, they should not have any of these codes
  ◦ HQ Information
  ◦ KECI directions
    · How to add/remove individuals from your district role list
    · It is important to keep this list updated
▸ FAQ section
▸ SIS Related Documents
  ◦ Ad Hoc Reports
  ◦ Extract Errors
  ◦ LEAD Data Elements
  ◦ Scheduling Standards
▸ Appendices
  ◦ Sample LEAD report
  ◦ Glossary
    · All report comments are in the Glossary
  ◦ Quick Reference to LEAD steps
    · Keep this page handy at ALL times

The LEAD Steps

Infinite Campus Steps

▸ Step 1 – Create the LEAD extract file in Infinite Campus
  ◦ Before creating the extract file:
    ∙ Run ad hoc reports to check for errors
  ◦ Selections on extract page
    ∙ For a smaller data set, select only one school
      ∙ All schools must be included in final extract
      ∙ Don't' make any changes on EPSB website with just one school loaded
    ∙ Formats – XML, CSV, HTML
      ∙ XML is required for upload
      ∙ Use CSV (Excel spreadsheet) or HTML if you want to look at specific data – these are in the raw file format

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Infinite Campus Steps

1. Date Range
   ∙ For the fall report: start of school to the last day of school in December
   ∙ For the spring report: start of school to the last day of school
2. Reporting Period
   ∙ Choose the appropriate report (fall or spring)
3. Format
   ∙ For upload to EPSB website the XML format **must** be selected
   ∙ For review purposes you can generate as CSV or HTML format
     ∙ This is a good way to check for duplicate staff members
4. Calendars
   ∙ Use CTRL+click or SHIFT+click to select more than one calendar
     ∙ For the final LEAD extract, **all schools** must be included
     ∙ For review purposes, you can upload one school/calendar at a time

IC Path:
KY State Reporting>LEAD Extract

Infinite Campus Steps

▸ Step 1 – continued
  ◦ Extract Summary (Error report)
    ∙ The summary error report created during the extract process indicates records that will not be included in the file uploaded to EPSB.
    ∙ These are NOT your LEAD errors; they **MUST** be resolved for accurate reporting
    ∙ Complete the extract process and upload to the EPSB site even if errors remain at first
  ◦ Save and Zip the file

EPSB Site Steps

▸ Step 2 – Upload the file to the EPSB website
  ◦ The EPSB LEAD system will warn you if the file name is not correct. It must be a zipped file. Acceptable versions include:
    • LEAD_xxx_#_14 (icon must have zipper)
    • LEAD_xxx_#_14.xml (icon must have zipper)
    • LEAD_xxx_#_14.xml.zip
      • # – 1 indicates Fall; 2 indicates spring
  ◦ If duplicate data exists in your file, it will not load = big red stop sign on upload
    • If you see the stop sign, e-mail EPSBLEADTEAM@ky.gov with your name, the district name, and the time of your error

EPSB Site Steps

▸ Step 3 – Open and review the report
  ◦ Always open preliminary audit report immediately after successful upload
  ◦ Use the "comments" to determine how to correct errors
  ◦ After the first upload, have the schools review the staff list on the full data report for inaccuracies
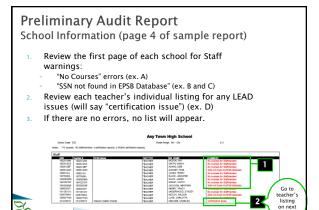
Correcting and Finalizing

▸ Step 4 – Correct issues
  ◦ Make corrections in Infinite Campus
  ◦ Repeat Steps 1, 2, and 3 as many times as needed
    • STOP HERE – these steps will be repeated multiple times. Do not move on until most corrections have been made using Infinite Campus
  ◦ Final edits can be done in the LEAD application (do not go to this step until all possible corrections have been made in Infinite Campus and uploaded through the LEAD application)

Correcting and Finalizing

‣ Step 5 – Submit the report
  ◦ Prior to sign off, have each school principal verify the full report for their school. Things they should look for include:
    · Teachers on the 1st page showing with no courses
    · Teachers with incorrect or missing schedules or content
    · Teachers missing from the report completely.
      · NOTE: collaborating special education teachers will not have an individual listing but should appear in the teacher list.
    · HQ status for each course once it has been entered at the school
  ◦ Sign off indicates you are done working with the report and all data is accurate
    · No changes after sign off
    · Errors still on the report as of Nov. 1 will be reported to KDE

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Preliminary Audit Report
School Information (page 4 of sample report)

1. Review the first page of each school for Staff warnings:
   ◦ "No Courses" errors (ex. A)
   ◦ "SSN not found in EPSB Database" (ex. B and C)
2. Review each teacher's individual listing for any LEAD issues (will say "certification issue") (ex. D)
3. If there are no errors, no list will appear.

Any Town High School

Go to teacher's listing on next pages

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Preliminary Audit Report
Assignment Errors

‣ This page shows certification information, MUNIS data, and assignment warnings for those with errors. Only the courses with errors will show. (examples on p. 5 & 7 of the sample report)
‣ Check MUNIS related errors – make sure the person has the correct job class code.
‣ Check the "comment" message, which will assist you in resolving certification and coding issues. – see page 2 of your report for a detailed list of errors

Preliminary Audit Report comments

‣ Certification Issue
  ◦ There is an error with one or more of this individual's courses or with their MUNIS jobclass code. This comment is not always indicative of a problem with the individual's certificate; is usually indicates a miscode of some kind.
‣ Holds only SOE/Must Submit COE
  ◦ The only valid credential held by the teacher is a Statement of Eligibility. If the teacher is new, please file the Confirmation of Employment with the KTIP office. If the teacher has completed KTIP, their current certification has expired and additional steps need to be taken.

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Preliminary Audit Report comments

‣ KTIP Approved
  ◦ This comment can indicate 2 different things:
    • 1. The individual has recently completed KTIP but the final report has not yet been submitted by the District KTIP coordinator
    • 2. The individual has been approved to enter KTIP but the internship certificate has not yet been processed
‣ KTIP Final
  ◦ The individual has recently completed KTIP and a final report has been received. Processing is not complete due to one or more missing items (usually $$)

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Preliminary Audit Report comments

‣ Specify Content
  ◦ The content is currently displaying "none."
  ◦ Assign a state course code on the course tab
  ◦ If the state code of 909999 has been assigned on the course tab, you will need to assign a content for each section on the section tab
    • Do not assign a content on the section tab otherwise
    • Any content listed on the section tab will be ignored unless the state code is 909999 or one of a few specific elementary course codes

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Preliminary Audit Report comments

▸ Specify Population
  ◦ If the population is displaying on the LEAD report as "None", there are no active students in the course.
    · This will also cause the grade range to default to the range of the school
  ◦ Assign students to the course or assign a population on the section tab
    · If the course was used at some point during the term, but all students have withdrawn, you must assign a population – it cannot be left as "none"

Preliminary Audit Report comments

▸ Out of Field
  ◦ The content for the course does not match the certification of the teacher
  ◦ Check the state course code to make sure it is appropriate for the course
  ◦ Check the section tab to remove an incorrect content

Preliminary Audit Report comments

▸ Out of Population
  ◦ One or more of the populations of the students does not match the certification of the teacher
  ◦ Remember – populations are assigned based on the students on the roster in the class and cannot be changed
  ◦ An FMD student mainstreamed into the classroom of a general ed teacher **requires** a collaborating FMD certified teacher
  ◦ Check the roster of students for active special ed flags and locked IEPs if the population is "General" in a special ed class.
    · A student cannot have overlapping IEPs – use IC Caseload Summary Report to find
  ◦ Change the Special Type if needed

Preliminary Audit Report comments

▸ Out of Grade Range
  ◦ The grade range comes from the students enrolled in the section
  ◦ If there are no students in the course, the grade range defaults to the range of the school
  ◦ There is no way to edit the grade range in Infinite Campus.
    · If it has defaulted to the grade range of the school and this isn't accurate (e.g. an elementary math coach in a PS-6 school only working with K-3 students) LEAD coordinators can edit the grade range on the LEAD website

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Preliminary Audit Report comments

▸ Incorrectly Coded (This error comment will only appear on the Edit LEAD Data Page).
  ◦ The content or the population is currently displaying "none." Supply the needed information to correct
▸ Insufficient Certification (course)
  ◦ The teacher's certification does not match one or more parameters of the course, but the LEAD system is unable to identify the specific problem
▸ Insufficient Certification (MUNIS)
  ◦ The teacher/administrator cannot clear this particular jobclass with their current certification

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Contact information - EPSB

▸ LEAD support/guidance
  ◦ contact the LEAD Help Desk
    · 1-888-598-7667 or EPSBLEADTEAM@ky.gov
▸ EPSB login, user id, and password
  ◦ contact EPSB help desk
    · 1-888-598-7667 or EPSBHELP@ky.gov
▸ Certification Questions
  ◦ contact the Division of Certification
    · 1-888-598-7667
▸ HQ Questions
  ◦ contact the HQ team
    · 1-888-598-7667 or EPSBHQ@ky.gov

LEAD Manual available at www.epsb.ky.gov/certification/LEAD.asp

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